

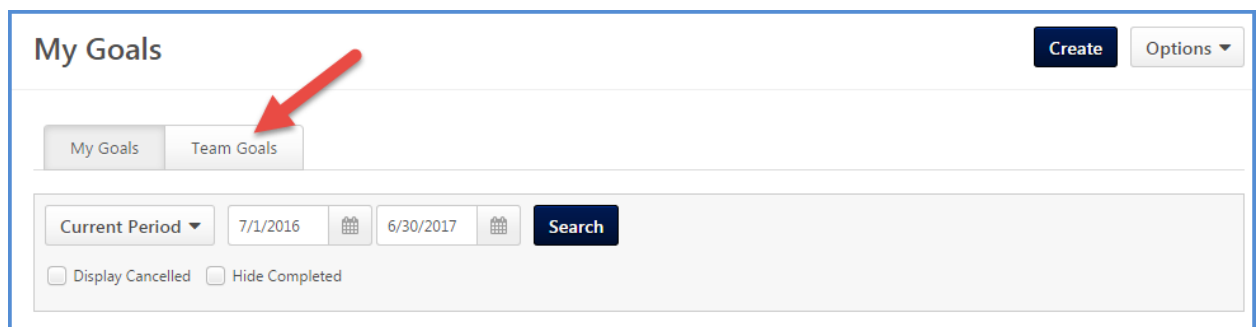
# GOALS: CANCEL AND/OR EDIT

The following job aid is intended to demonstrate how to cancel and/or edit goals. Before making any edits or cancellations, refer to the approved goals spreadsheet provided by your NCVIP Core Representative. Changes should be made by the direct supervisor listed in Beacon. If an employee or in-direct manager makes any changes to a goal, the changes will go into a pending approval status to the supervisor.

1. Manager/Supervisor: In NC Learning Center: Under the Performance Tab, Click **"GOALS"**.



2. Click the **"TEAM GOALS"** tab.



**To Cancel a Goal:** Continue to step 3.

**To Edit a Goal:** Click [here](#) to begin with step 8.

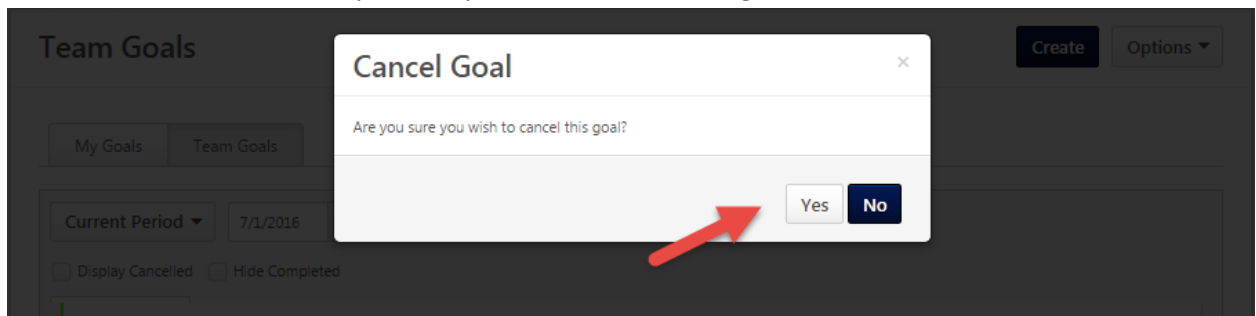
Below are the steps a manager will take to cancel a goal that may have been advanced or created in error. The total goal weight for an employee should equal 100%. There may be some cases where an employee may have greater than 100% goal weight due to a personnel transaction, such as a promotion.

3. Check the goals **"Total Weight"** for the employee to determine if the goal percentage is correct. The total weight should equal 100%.

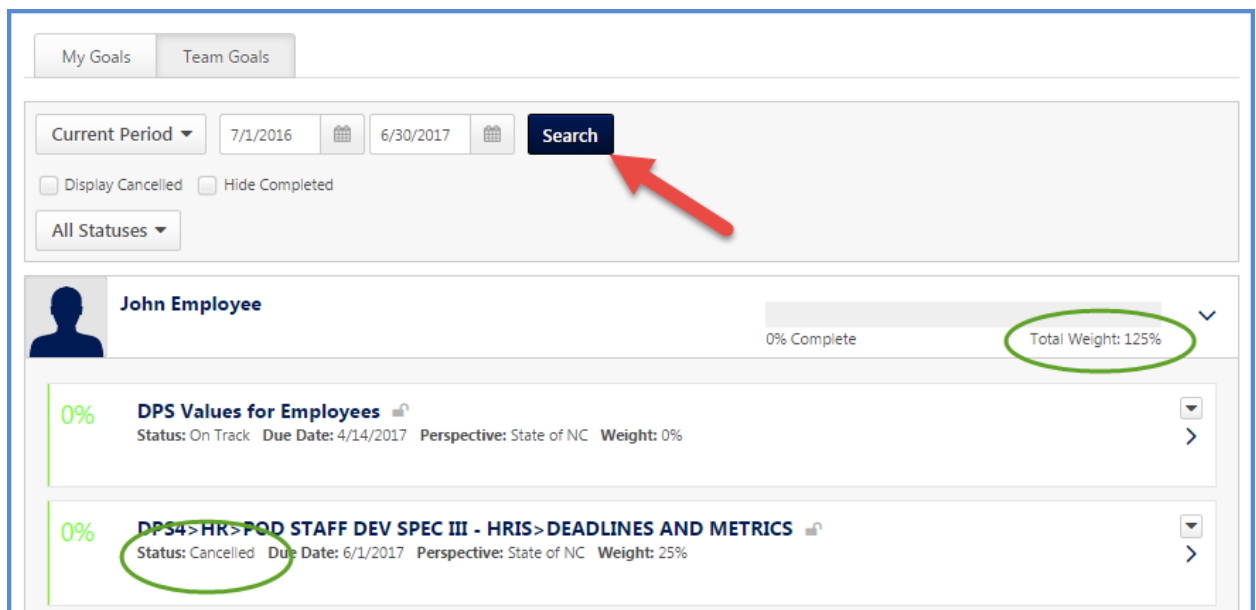
Click the **>** sign to the right of the employee's name to reveal each of the employee's goals.

4. Click the **upside down triangle** beside the incorrect or duplicate goal(s), then **"CANCEL"** for the goal(s) that you wish to delete.

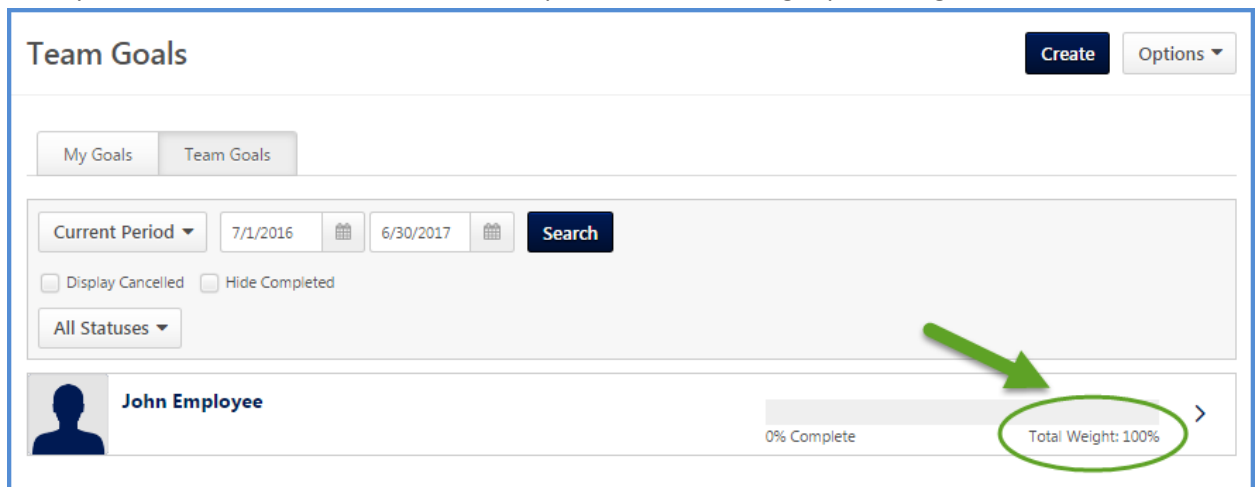
5. Click **"YES"** when it ask, "Are you sure you wish to cancel this goal?"



6. Once you have selected "yes", the status of the goal will show as "Cancelled" and the Total Weight of the goals will remain unchanged until you click **"SEARCH"**.



7. After you have clicked "Search", it will then update the Total Weight percentage.



**Step 7 completes the process for canceling a goal. If additional goals need to be canceled, return to step 3.**

## To Edit a Goal: Complete Steps 8-12.

Below are the steps a manager may take to correct an error to an approved goal.

8. Click the **>** sign to the right of the employee's name to reveal each of the employee's goals.

The screenshot shows the 'Team Goals' section for 'John Employee'. At the top, there are tabs for 'My Goals' and 'Team Goals', and buttons for 'Create' and 'Options'. Below these are filters for 'Current Period' (7/1/2016 to 6/30/2017), a 'Search' button, and checkboxes for 'Display Cancelled' and 'Hide Completed'. A dropdown menu shows 'All Statuses'. The employee's name 'John Employee' is displayed with a profile icon. To the right of the name is a progress bar showing '0% Complete' and 'Total Weight: 100%'. A red arrow points to a right-pointing chevron icon next to the progress bar.

9. Click the **upside down triangle** to **"EDIT"** for the goal that you wish to edit.

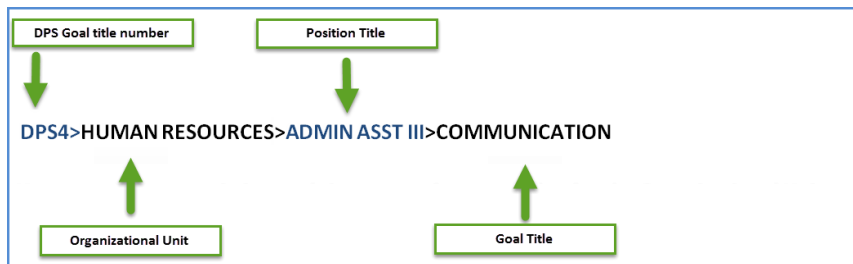
This screenshot shows the same 'Team Goals' interface, but with the list of goals expanded. The first goal is 'DPS Values for Employees' with a status of 'On Track', due date of '4/14/2017', perspective of 'State of NC', and weight of '0%'. The second goal is 'DPSS>HR>POD STAFF DEV SPEC III - HRIS>CUSTOMER SERVICE AND COMMUNICATION' with a status of 'On Track', due date of '6/1/2017', perspective of 'State of NC', and weight of '25%'. A red arrow points to the dropdown menu of the second goal, which is open and shows options: 'Edit', 'Copy', 'Cancel', and 'View Historical Activity'.

10. Review the **goal template** provided by your NCVIP Core Team Member to determine if edits are needed. **ONLY EDITS AUTHORIZED BY YOUR NCVIP CORE TEAM MEMBER SHOULD BE MADE.**

Select the appropriate section (1-7) to make the edit(s) as shown in the screen shot on page 6. The edits should correspond with the goal template provided to you by your assigned core team member.

When creating a goal title, use the directions that follows:

Use all caps, enter the [DPS Goal Title Number](#), your Organizational Unit and Position Title in the Goal Title section of the Create Goals screen.



You may reference existing goals in your performance plan for the Organizational Unit and Position title.

The DPS Goals are:

DPS 1 - Prevent: NCDPS strives to be the model for preventing and reducing crime.

DPS 2 – Protect: We make our communities safer for living, working and visiting.

DPS 3 – Prepare: We leaders in public safety readiness, communication and coordination.

DPS 4 – Perform: We excel in every facet of our work.

DPS 5 – People: Make our organization a preferred employer

***Be sure not to include a DPS Value (ex. Safety, Customer Service) in the name of the goal.***

Once goal edits are completed, scroll down to the bottom of the page and click **“SUBMIT”**.

## Edit Goals

Options ▾

Enter details or import using the Library.

### Goal Title \*

DPSS>HR>POD STAFF DEV SPEC III - HRIS>CUSTOMER SERVICE AND COMMUNICATION

When editing a goal title, see additional instructions above.

### Goal Description \*

**B** **I** **S** **U** |

Manage client relationships by delivering responsive, informative, & positive experiences for internal and external clients, providing quality service. Assess program needs with input from leadership and stakeholders within assigned area.

### Start Date

7/1/2016

### Due Date \*

6/1/2017

### Weight \*

25

### Perspective \*

State of NC ▾

### Goal Category(s)

2 Selected ▾

### Tasks \*

Total Weight: 100%



#### Description:

Solicit feedback from stakeholders quarterly regarding the NCVIP system and functionality within their... [read more](#)

Start Date:  
7/1/2016

Due Date:  
4/14/2017

Weight:  
34 %



Edit  
Delete



#### Description:

Review NCVIP reporting monthly to identify errors, trends, and deviations from best practices. Develop a draft plan to... [read more](#)

Start Date:  
7/1/2016

Due Date:  
4/14/2017

Weight:  
33 %



#### Description:

Notify POD staff of any NCVIP updates, changes or modifications including needed NCVIP classroom training related... [read more](#)

Start Date:  
7/1/2016

Due Date:  
4/14/2017

Weight:  
33 %



Add Tasks

### Attachments

Choose File

Upload up to 3 attachments. Maximum upload 1mb

### Comments

Add Comment

Cancel

Submit

11. Once you click the “Submit” button, it will bring you back to the goals screen. To review the changes, Click the > sign to the right of the employee’s name to reveal each of the employee’s goals.

Team Goals

Create Options

My Goals Team Goals

Current Period 7/1/2016 6/30/2017 Search

☐ Display Cancelled ☐ Hide Completed

All Statuses

John Employee

0% Complete Total Weight: 100%

12. Click on the goal name to review any changes that have been made.

Team Goals

Create Options

My Goals Team Goals

Current Period 7/1/2016 6/30/2017 Search

☐ Display Cancelled ☐ Hide Completed

All Statuses

John Employee

0% Complete Total Weight: 100%

0% DPS Values for Employees Status: On Track Due Date: 4/14/2017 Perspective: State of NC Weight: 0%

0% DPS5>HR>POD STAFF DEV SPEC III - HRIS> COMMUNICATION Status: On Track Due Date: 6/1/2017 Perspective: State of NC Weight: 25%